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SALES SURVEY OF THE SOFT DRINK INDUSTRY NSDA 1982

Foreword

1982 National Summary

Regional Analyses

Estimated Annual Production and Consumption of Soft Drinks — 1949-1982

Glossary

FOREWORD

Each year the National Soft Drink Association presents this review of the industry's sales performance based on a survey of Association members and other soft drink manufacturers eligible for membership in NSDA. For 1982, 307 plants voluntarily participated by providing information on beverage production in finished drink and syrup form for the years 1981 and 1982, package types, distribution of packaged sales, and bulk sales. These responses were then tabulated to provide calculations necessary to estimate both national and regional sales patterns.

This estimate of annual growth is reconciled with the U.S. Department of Commerce's 1977 Census of Manufactures. Bottles and can shipments, sugar usage, crown shipments, and information on performance of public companies also contribute to the final figures.

The survey shows growth in terms of units and converted units. The increases for converted units reflect increases in gallonage consumed. Converted units are composed of 288-ounce cases, or twenty-four 12-ounce containers. Sales of bulk products are reported on a finished drink basis.

National bulk figure results are statistically linked to prior year results. Regional bulk figures sales are limited only to information supplied by survey respondents and are not statistically linked to prior year results.

In 1977, the 12-ounce container was adopted as the standard sampling size of the average container for use in this survey. Figures for years prior to 1977 have been changed to correspond with this standard.

Results in some instances do not correspond precisely to other available information about trends and patterns in the soft drink industry. Such results may occur because of sampling distortions related to the number of respondents and their types of operations, size, and product definitions.

It is recommended that readers refer to the Glossary of Terms for further information regarding definitions of terms used for the survey results.

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1982 NATIONAL SUMMARY

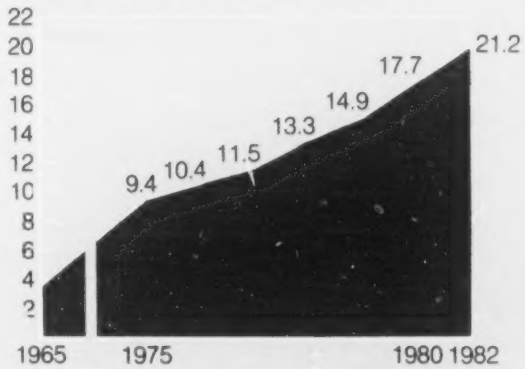
Plants Reporting: 307

TOTAL SALES

Gallonage	+2.7%
Packaged	+2.4%
Bulk	+4.7%
Units	+2.4%
Dollar Value	+5.7%

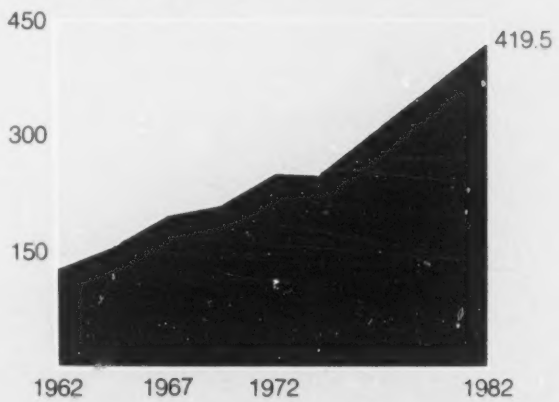
NATIONAL SALES

$ Value in Billions—Wholesale Value



PER CAPITA CONSUMPTION

in 12 oz. units



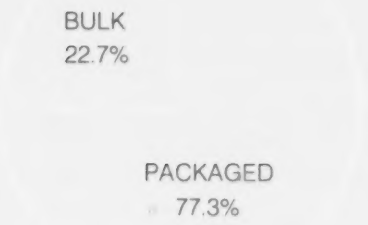
Total Sales

Soft drink sales and consumption increased in 1982 at rates slightly slower than those experienced by the industry in 1981. Total gallonage (bulk and packaged) grew at a 2.7% rate, with packaged at 2.4% and bulk at 4.7%. Unit sales rose by 2.4%. Total dollar value increased 5.7% during 1982.

Total sales of 4,065,815,000 cases (288 ounces) of standardized units represented a wholesale value estimated at $21.2 billion. Per capita consumption advanced to 419.5 12-ounce units.

MARKET SHARE BY PACKAGING TYPE

PACKAGING
Market Shares

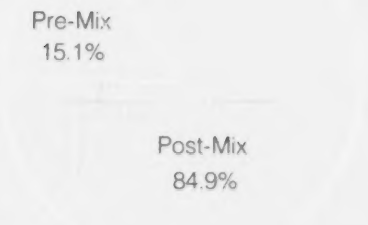


Bulk packaging now accounts for 22.7% of the national market with packaged sales holding 77.3%.

Post-mix accounted for 84.9% and pre-mix, 15.1% of the bulk sales.

In packaged sales, the market share for cans was 36.5%; refillable glass, 26.4%; plastics, 21.4%; and one-way glass, 15.7%.

BULK



Market shares for one-way glass:

6-9 oz.	0.7%
10-12 oz.	29.2%
16 oz.	55.2%
24-32 oz./1 liter	5.3%
48-64 oz./2 liter	9.5%

Market shares for refillable glass:

6-9 oz.	2.3%
10-12 oz.	13.5%
16 oz.	64.4%
24-32 oz./1 liter	19.7%
48-64 oz./2 liter	0.2%

PACKAGED

Market shares for plastic:

1/2 liter	2.4%
1 liter	4.4%
2 liter	93.2%

CONTAINER SALES

Percent of change

SALES

Bulk sales were up 4.7% in 1982 with pre-mix increasing 2.4% and post-mix increasing 5.2%.

Packaged sales were up 2.4% led by plastic at 9.8%. One-way glass increased 6.5% and can sales were up 3.6%. Refillable glass decreased 6.5%.

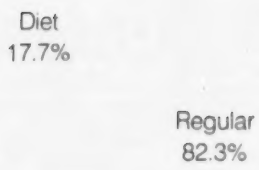
Among glass packages, the one-way 16-ounce bottle increased 11.8%, the 2 liter bottle increased 9.5% and the 10-12 oz. bottle increased 2.0%. The refillable 16-ounce grew at a 1.0% rate. All other categories were off from the previous year.

GLASS CONTAINER SALES FROM PREVIOUS YEAR

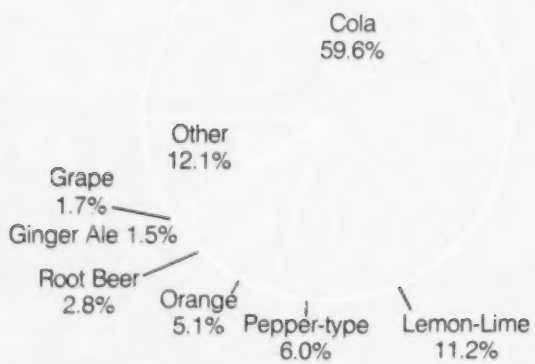
GLASS CONTAINER SIZE	ONE WAY	REFILLABLE
6-9 oz.	−11.8%	−19.8%
10-12 oz.	+2.0%	−16.6%
16 oz.	+11.8%	+1.0%
24-32 oz./1 liter	−16.6%	−17.7%
48-64 oz./2 liter	+9.5%	−37.0%

MARKET SHARES BY FLAVOR

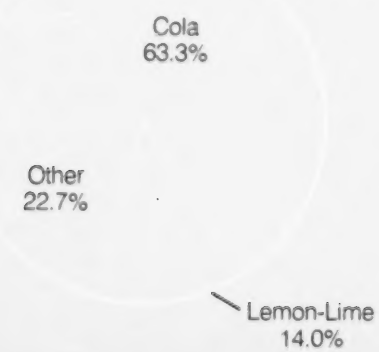
FLAVOR MIX



REGULAR



DIET



Flavor Mix

(Figures for individual flavors are subject to sampling distortions.)

Regular soft drinks accounted for 82.3% of packaged sales, with diet increasing in 1982 to 17.7%.

In the regular category, cola held a 59.6% share; lemon-lime, 11.2%; pepper-type 6.0%; and orange, 5.1%.

In the diet category, cola held a 63.3% share, and lemon-lime, a 14.0% share.

Distribution

Soft drink sales in supermarkets accounted for 46.6% of packaged volume, convenience stores for 19.4%, vending machines for 17.3%, and other retail outlets for 16.7%.

DISTRIBUTION

REGIONAL ANALYSES

Northeastern Region

Plants Reporting—38

Connecticut
Delaware
District of Columbia
Maine
Maryland
Massachusetts
New Hampshire
New Jersey
New York
Pennsylvania
Rhode Island
Vermont

Southern Region

Plants Reporting—76

Alabama
Arkansas
Florida
Georgia
Louisiana
Mississippi
North Carolina
South Carolina
Tennessee
Virginia

East Central Region

Plants Reporting—60

Illinois
Indiana
Kentucky
Michigan
Ohio
West Virginia
Wisconsin

Western Region

Plants Reporting—18

Colorado
Idaho
Montana
Nevada
Utah
Wyoming

Southwestern Region

Plants Reporting—37

Arizona
New Mexico
Oklahoma
Texas

West Central Region

Plants Reporting—45

Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota

Pacific Region

Plants Reporting—33

Alaska
California
Hawaii
Oregon
Washington

NORTHEASTERN REGION

Plants Reporting: 38

Connecticut
Delaware
District of Columbia
Maine
Maryland
Massachusetts
New Hampshire
New Jersey
New York
Pennsylvania
Rhode Island
Vermont

SALES FROM PREVIOUS YEAR

Gallonage +2.1%

Units +1.9%

Bulk +8.5%

Packaged +1.6%

Dollar Value −0.2%

INCREASE

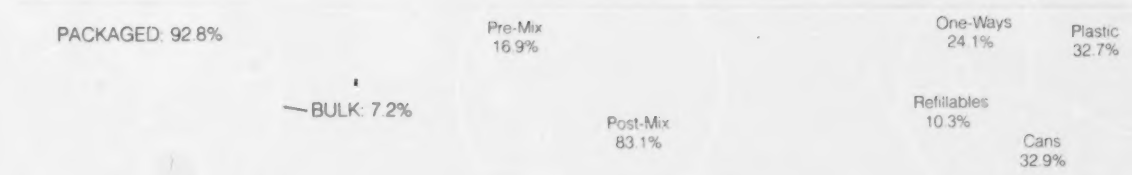
DECREASE

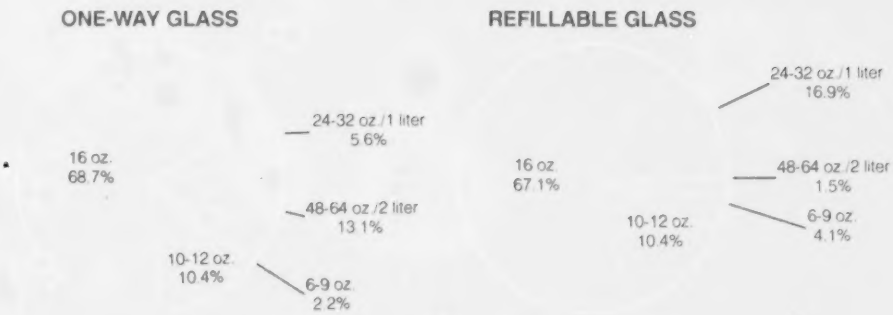
Package Type

Pre-Mix	+5.3%
Post-Mix	+9.2%
Plastic	+1.4%
Cans	+3.4%
Refillable Glass	−6.6%
One-Way Glass	+3.3%

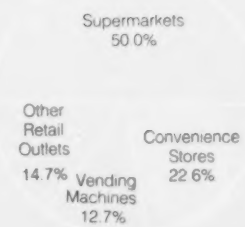
GLASS CONTAINER SIZE	ONE-WAY	REFILLABLE
6-9 oz.	−12.2%	−16.6%
10-12 oz.	−16.5%	−15.3%
16 oz.	+12.5%	−4.9%
24-32 oz./1 liter	−20.7%	−1.4%
48-64 oz./2 liter	−4.0%	−31.3%

MARKET SHARES





DISTRIBUTION



FLAVOR MIX FOR PACKAGED

(Figures for individual flavors are subject to sampling distortions.)

REGULAR SOFT DRINKS	**78.6%**
Cola	64.7%
Lemon-Lime	11.2%
Orange	7.3%
DIET SOFT DRINKS	**21.4%**
Cola	70.1%
Lemon-Lime	12.6%

SOUTHERN REGION

Plants Reporting: 76

Alabama
Arkansas
Florida
Georgia
Louisiana
Mississippi
North Carolina
South Carolina
Tennessee
Virginia

SALES FROM PREVIOUS YEAR

Gallonage +3.0%

Units +2.2%

Bulk +5.0%

Packaged +2.6%

Dollar Value +5.8%

Package Type

Pre-Mix	−0.2%
Post-Mix	+7.0%
Plastic	+16.1%
Cans	+7.5%
Refillable Glass	−11.3%
One-Way Glass	+10.2%

GLASS CONTAINER SIZE	ONE-WAY	REFILLABLE
6-9 oz.	*	−21.0%
10-12 oz.	+7.5%	−16.3%
16 oz.	+7.4%	+1.3%
24-32 oz./1 liter	−10.5%	−20.7%
48-64 oz./2 liter	+37.8%	−69.8%

MARKET SHARES

PACKAGED: 85.9%

BULK: 14.1%

BULK

Pre-Mix 26.9%

Post-Mix 73.1%

PACKAGED

Plastic 21.4%

One-Ways 18.4%

Cans 28.4%

Refillables 31.8%

ONE-WAY GLASS

24-32 oz./1 liter 4.3%

10-12 oz. 35.6%

48-64 oz./2 liter 15.2%

6-9 oz. 0.1%

16 oz. 44.8%

REFILLABLE GLASS

24-32 oz./1 liter 25.8%

48-64 oz./2 liter less than 1%

16 oz. 42.6%

6-9 oz. 5.7%

10-12 oz. 26.0%

DISTRIBUTION

Supermarkets 44.9%

Convenience Stores 18.6%

Other Retail Outlets 13.0%

Vending Machines 23.6%

FLAVOR MIX FOR PACKAGED

(Figures for individual flavors are subject to sampling distortions.)

REGULAR SOFT DRINKS	**87.1%**
Cola	68.2%
Lemon-Lime	9.4%
Pepper-type	7.1%
DIET SOFT DRINKS	**12.9%**
Cola	62.0%
Lemon-Lime	11.6%

*Small sample size distorts analysis

EAST CENTRAL REGION

Plants Reporting: 60

Illinois
Indiana
Kentucky
Michigan
Ohio
West Virginia
Wisconsin

SALES FROM PREVIOUS YEAR

Gallonage +1.8%

Units +1.3%

Bulk +1.0%

Packaged +1.9%

Dollar Value +4.7%

Package Type

Pre-Mix	+1.4%
Post-Mix	+1.0%
Plastic	+12.3%
Cans	+0.2%
Refillable Glass	−0.8%
One-Way Glass	+9.0%

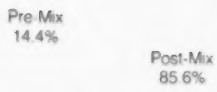
GLASS CONTAINER SIZE	ONE-WAY	REFILLABLE
6-9 oz.	−5.6%	−20.4%
10-12 oz.	+2.1%	−14.0%
16 oz.	+14.7%	+2.8%
24-32 oz./1 liter	−0.1%	−29.6%
48-64 oz./2 liter	−4.5%	—

MARKET SHARES

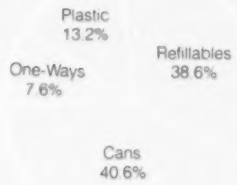
PACKAGED: 88.4%

BULK: 11.6%

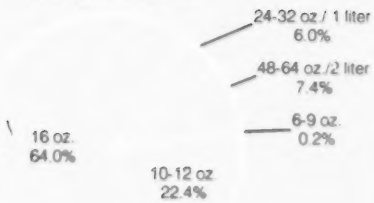
BULK



PACKAGED

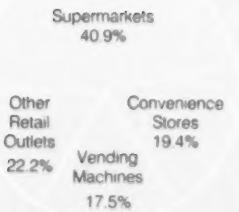


ONE-WAY GLASS



REFILLABLE GLASS

DISTRIBUTION



FLAVOR MIX FOR PACKAGED

(Figures for individual flavors are subject to sampling distortions.)

REGULAR SOFT DRINKS 63.9%	
Cola	65.1%
Lemon-Lime	10.5%
Orange	4.1%
DIET SOFT DRINKS 16.1%	
Cola	69.6%
Lemon-Lime	16.1%

WEST CENTRAL REGION

Plants Reporting: 45

Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota

SALES FROM PREVIOUS YEAR

Gallonage +2.6%

Units +2.2%

Bulk +3.3%

Packaged +2.5%

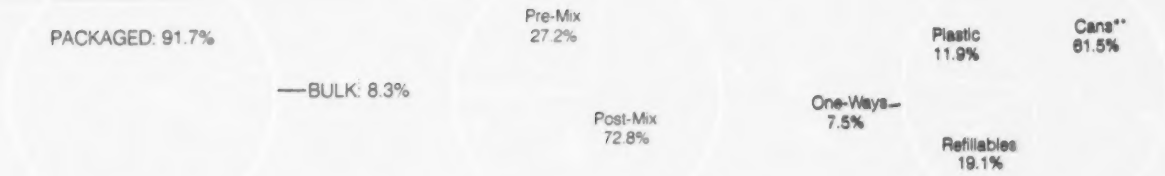
Dollar Value +8.0%

Package Type

Pre-Mix	−1.2%
Post-Mix	+5.1%
Plastic	+15.9%
Cans	+2.3%
Refillable Glass	−2.1%
One-Way Glass	−1.1%

GLASS CONTAINER SIZE	ONE-WAY	REFILLABLE
6-9 oz.	—	−16.9%
10-12 oz.	+0.2%	−12.4%
16 oz.	+6.0%	+6.0%
24-32 oz./1 liter	−38.8%	−16.6%
48-64 oz./2 liter	+9.2%	−40.0%

MARKET SHARES

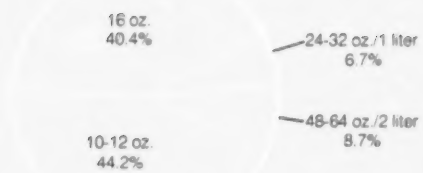


BULK

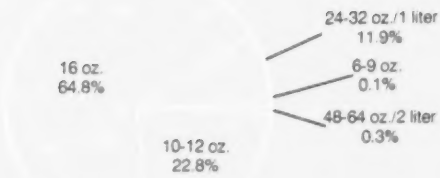
PACKAGED

**SUBJECT TO SAMPLING ERROR

ONE-WAY GLASS



REFILLABLE GLASS



DISTRIBUTION

FLAVOR MIX FOR PACKAGED

(Figures for individual flavors are subject to sampling distortions.)

REGULAR SOFT DRINKS	77.4%
Cola	42.6%
Lemon-Lime	12.3%
Pepper-type	9.1%
DIET SOFT DRINKS	22.6%
Cola	55.7%
Lemon-Lime	12.1%

SOUTHWESTERN REGION

Plants Reporting: 37

Arizona
New Mexico
Oklahoma
Texas

SALES FROM PREVIOUS YEAR

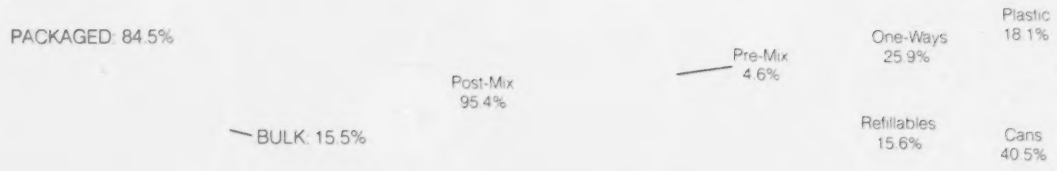
Gallonage	+7.7%
Units	+7.5%
Bulk	+6.7%
Packaged	+7.9%
Dollar Value	+16.6%

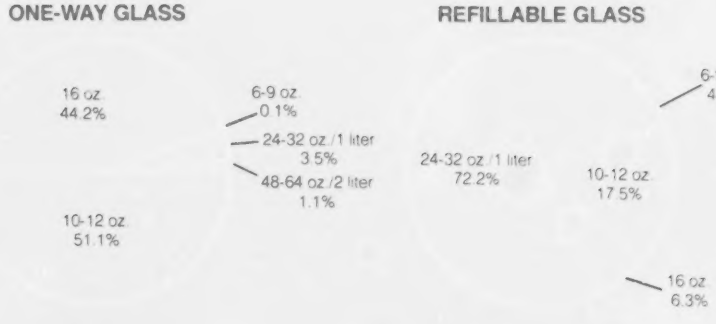
Package Type

Pre-Mix	+12.4%
Post-Mix	+6.3%
Plastic	+17.8%
Cans	+14.7%
Refillable Glass	−17.0%
One-Way Glass	+11.0%

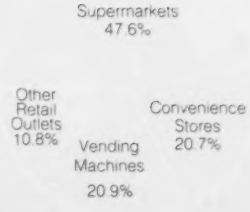
GLASS CONTAINER SIZE	ONE-WAY	REFILLABLE
6-9 oz.	−39.6%	−14.5%
10-12 oz.	+4.9%	−22.4%
16 oz.	+22.1%	−32.8%
24-32 oz./1 liter	−12.3%	−13.9%
48-64 oz./2 liter	+7.2%	—

MARKET SHARES





DISTRIBUTION



FLAVOR MIX FOR PACKAGED

(Figures for individual flavors are subject to sampling distortions.)

REGULAR SOFT DRINKS	**86.7%**
Cola	62.9%
Lemon-Lime	10.4%
Pepper-type	9.5%
DIET SOFT DRINKS	**13.3%**
Cola	63.2%
Lemon-Lime	13.8%

WESTERN REGION

Plants Reporting: 18

Colorado
Idaho
Montana
Nevada
Utah
Wyoming

SALES FROM PREVIOUS YEAR

Gallonage +4.9%

Units +4.7%

Bulk +8.1%

Packaged +4.3%

Dollar Value +11.9%

Package Type

Pre-Mix	+21.0%
Post-Mix	+5.5%
Plastic	−2.0%
Cans	+5.1%
Refillable Glass	−11.7%
One-Way Glass	+39.8%

GLASS CONTAINER SIZE	ONE-WAY	REFILLABLE
6-9 oz.	−73.9%	−0.5%
10-12 oz.	+5.0%	−18.5%
16 oz.	+103.0%	+0.5%
24-32 oz./1 liter	+2.6%	−21.1%
48-64 oz./2 liter	+27.3%	—

MARKET SHARES

PACKAGED: 84.2%

BULK: 15.8%

BULK

Pre-Mix 19.0%

Post-Mix 81.0%

PACKAGED

Plastic 5.7%

One-Ways 11.6%

Cans 65.8%

Refillables 16.9%

ONE-WAY GLASS

48-64 oz./2 liter 45.9%

24-32 oz./1 liter 1.4%

10-12 oz. 17.8%

16 oz. 34.9%

6-9 oz., less than 1%

REFILLABLE GLASS

24-32 oz./1 liter 36.5%

6-9 oz. 0.2%

16 oz. 46.7%

10-12 oz. 16.6%

DISTRIBUTION

Supermarkets 59.7%

Other Retail Outlets 13.6%

Vending Machines 11.4%

Convenience Stores 15.3%

FLAVOR MIX FOR PACKAGED

(Figures for individual flavors are subject to sampling distortions.)

REGULAR SOFT DRINKS	**81.0%**
Cola	51.6%
Lemon-Lime	18.9%
DIET SOFT DRINKS	**19.0%**
Cola	62.3%
Lemon-Lime	21.6%

PACIFIC REGION

Plants Reporting: 33

Alaska
California
Hawaii
Oregon
Washington

SALES FROM PREVIOUS YEAR

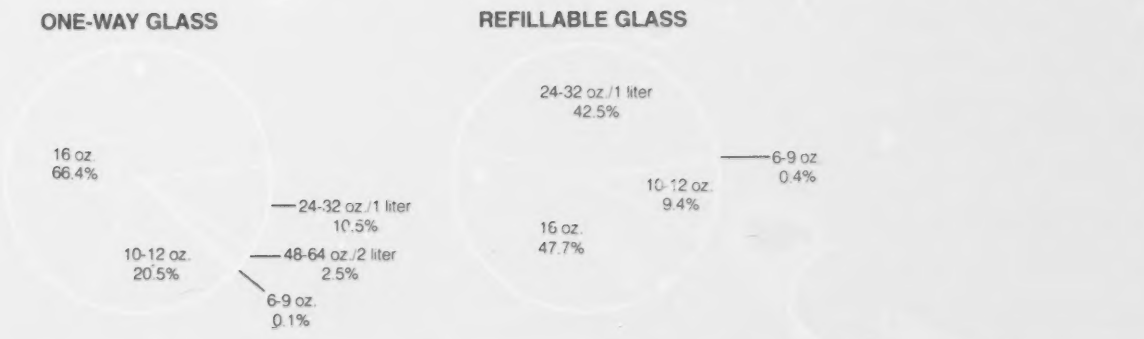
Package Type

Pre-Mix	+7.0%
Post-Mix	+6.9%
Plastic	+8.4%
Cans	+0.9%
Refillable Glass	−14.7%
One-Way Glass	−4.9%

GLASS CONTAINER SIZE	ONE-WAY	REFILLABLE
6-9 oz.	−17.9%	−44.1%
10-12 oz.	+5.8%	−28.3%
16 oz.	−6.1%	−11.0%
24-32 oz./1 liter	−13.8%	−14.6%
48-64 oz./2 liter	−8.5%	*

MARKET SHARES

**SUBJECT TO SAMPLING ERROR



DISTRIBUTION

*Small sample size distorts analysis

FLAVOR MIX FOR PACKAGED

(Figures for individual flavors are subject to sampling distortions.)

REGULAR SOFT DRINKS	**78.2%**
Cola	41.9%
Lemon-Lime	14.2%
DIET SOFT DRINKS	**21.8%**
Cola	52.0%
Lemon-Lime	16.1%

ESTIMATED ANNUAL PRODUCTION AND CONSUMPTION OF SOFT DRINKS

Year	Total Value $ (Wholesale)	Total Cases (288 ounce)	Per capita (12 oz containers)
1982	21,156,140,000	4,065,815,000	419.5
1981	20,015,269,000	3,959,697,000	412.3
1980	17,676,648,000	3,816,575,000	401.0
1979	14,972,628,000	3,664,500,000	389.0
1978	13,344,588,000	3,490,000,000	375.0
1977	11,526,810,000	3,247,722,000	353.0
1976	10,375,167,000	2,952,474,700	324.0
1975	9,397,797,600	2,610,499,300	289.0
1974	7,827,131,000	2,532,007,300	283.0
1973	6,223,156,500	2,514,406,700	284.0
1972	5,683,820,000	2,360,944,700	269.0
1971	5,346,960,000	2,235,743,300	258.0
1970	4,799,784,000	2,064,423,300	241.0
1969	4,369,664,000	1,942,073,300	229.6
1968	4,165,552,000	1,851,356,700	221.1
1967	3,458,632,000	1,646,968,000	198.7
1966	3,175,980,000	1,568,391,300	191.3
1965	2,735,567,000	1,402,854,700	172.7
1964	2,533,167,000	1,299,060,000	161.9
1963	2,341,189,000	1,200,601,000	151.6
1962	2,001,016,800	1,111,676,000	142.3
1961	1,829,083,200	1,016,157,300	132.2
1960	1,698,025,600	984,362,700	128.0
1959	1,633,015,900	989,706,700	133.2
1958	1,427,463,500	906,326,000	124.3
1957	1,347,241,500	907,233,300	126.1
1956	1,308,000,000	880,809,300	125.9
1955	1,252,276,000	843,283,300	122.8
1954	1,166,605,000	784,449,300	116.1
1953	1,089,513,000	785,234,700	118.3
1952	1,019,295,000	755,033,300	116.0
1951	939,442,500	695,883,300	108.5
1950	876,532,600	667,834,300	105.3
1949	860,959,300	675,262,200	108.0
1948	835,157,300	673,242,500	109.6
1947	745,676,000	601,109,300	100.6
1946	617,168,600	514,307,200	88.2
1945	584,994,000	487,495,000	88.6
1939	361,690,917	321,997,120	59.1
1929	214,322,238	181 618,990	35.4
1919	135,341,000	112,784,100	25.6
1909	43,508,000	41,436,200	10.8
1899	23,269,000	28,854,450	8.1
1889	14,354,000	17,398,800	6.6
1879	4,742,000	6,322,700	3.0
1869	4,222,000	5,629,300	4.3
1859	1,415,000	1,986,700	1.5
1849	760,000	1,013,300	1.1

Note: 1982 Resident Population was 232,673,000 according to the U.S. Dept. of Commerce, Bureau of the Census, based on revised census report. For purposes of the report, all soft drink sales are converted to gallons and expressed in cases of 24 twelve-ounce containers. Prior to 1977 the standard case was 24 eight-ounce containers. This change was made to more accurately reflect the average size container. Per capita consumption figures for 1970-1980 have been restated and rounded to reflect revision of Census figures.

GLOSSARY OF TERMS

Bulk: Consists of "fountain" soft drink dispensed in two forms: Post-Mix and Pre-Mix.

Post-Mix: Finished soft drink syrup which is mixed with carbonated water at the dispensing stage.

Pre-Mix: Finished soft drink beverage dispensed from a 5-gallon cylinder.

Packaged: Those soft drinks which are distributed in cans, plastic bottles, disposable glass, or refillable glass.

Gallonage: Refers to fluid volume of soft drinks sold.

Units: Refers to number of containers (both bulk and packaged) of soft drinks sold. (Note: Gallonage and unit increases may differ because fewer containers or servings of soft drinks are purchased, but are purchased in larger volume *per container*.)

Dollar Value: For the purposes of the Sales Survey, dollar value refers to the wholesale value of the product manufactured or distributed. The Association does not have any retail figures for soft drinks.

Plastic: Refers to polyethylene terephthalate (PET) beverage containers. This package is a one-way container, but should not be considered as part of the one-way *glass* category.

Per Capita Consumption: A *statistical measurement* of consumption arrived at by dividing the total volume of soft drink sales by the population of the United States.

Other Retail Stores: When discussing soft drink distribution, this term refers to outlets other than supermarkets and convenience stores such as drug stores, general merchandise stores, etc.

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